

A still from the movie Frozen showing Elsa standing in a blue, icy environment, looking down with a sad expression. She is wearing her iconic blue ice dress.

Let It Go

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of Minnesota Libraries

**Moving on from a subscription or tool without
leaving your users behind**

Learning Objectives

Participants will understand how to evaluate a tool in order to make a case for its cancellation or continuation.

Participants will be able to identify a range of potential stakeholders affected by a cancellation and develop a plan to communicate effectively to each audience.

Our experiences



RefWorks case study

— — —

- Long-standing subscription (14 years!)
- Recommended by and supported by the Libraries
- Some very heavy users
- Lots of staff expertise
- Declining usage
- More competition, free alternatives
- 18-month timeline for cancellation

BrowZine Case Study

— — —

- 4-year “pilot” subscription
- Some support and promotion by Libraries
- Minimal feedback from/ability to contact users
- 3-month timeline for cancellation

Steps to Saying Goodbye

— — —

1. Evaluate
2. Map out the process
3. Develop support materials
4. Make a communications plan
5. Acknowledge emotions



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What information do you have and what do you need?

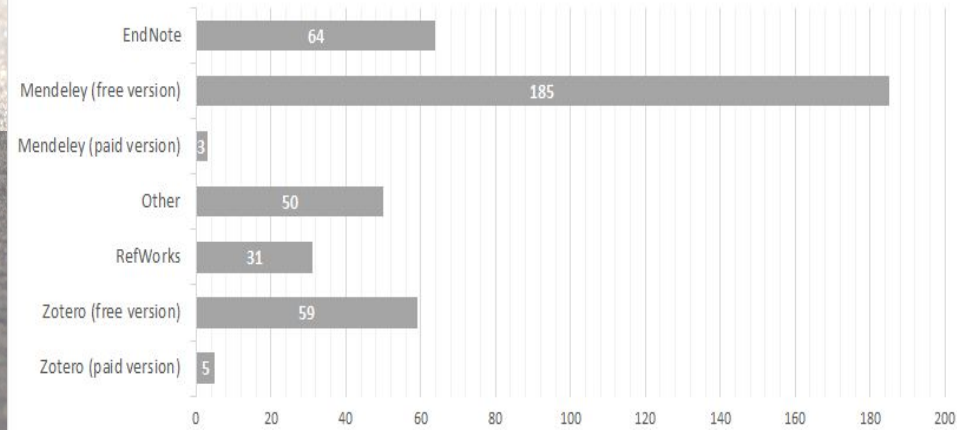
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- Is the vendor data useful?
- Does your library collect relevant data?
- Would it be helpful to survey users?
- Have other libraries reviewed the product?
- Who makes the final decision and what information do they want?

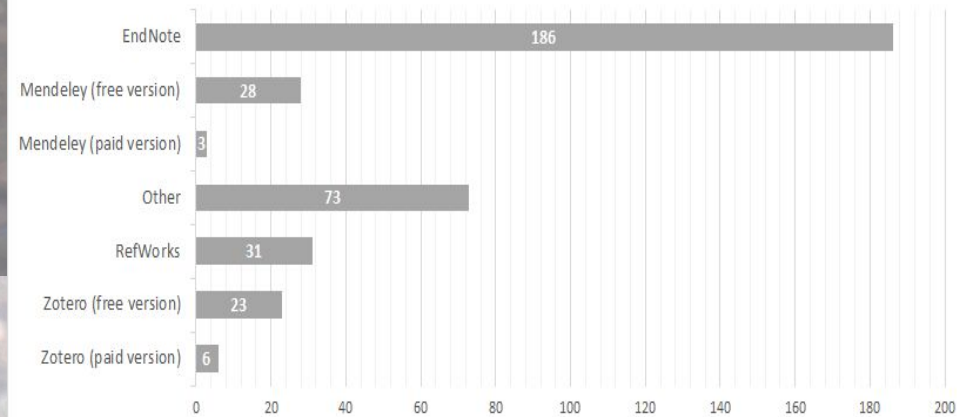
Examples

RefWorks
Survey data from users

Citation Managers used by Grad Students (n=399)



Citation Managers used by Faculty (n=354)



Examples

Browzine

Report:	Summary
Library:	University_of_Minnesota
Date Range:	Apr 01, 2017 thru Apr 30, 2017
Sessions	425
My Bookshelf Views	1198
TOC Views	3083
Full Text Downloads	979
Percentage of Sessions on iOS	73%
Percentage of Sessions on Android	13%
Percentage of Sessions on Browzine.com	14%
Time Using BrowZine	4,116 Minutes

Report:	Full Text Downloads
Library:	University_of_Minnesota
Date Range:	Apr 01, 2017 thru Apr 30, 2017
Total Full Text Article Views	979

Journal Name	Full Text Downloads
Science (AAAS)	72
Nature	40
New England Journal of Medicine (NEJM)	36
JAMA: The Journal of the American Medical Association	33
(Assorted Journals)	32
Annals of Internal Medicine	28
Pediatrics in Review	24
Journal of Vascular and Interventional Radiology	16



Worksheet

1a. Evaluate your data

- What do you have already and what can you get?
- Is your vendor data useful, does your library have relevant data, would a survey of users be helpful, can you learn from other libraries work?

Who are the stakeholders?

— — —

- Staff
- Administration
- Community
- Power Users
- Others?





Worksheet

1b. Identify your stakeholders

- Staff, administration, community, power users, others?
- Any special use cases to take into consideration?

What is the decision?

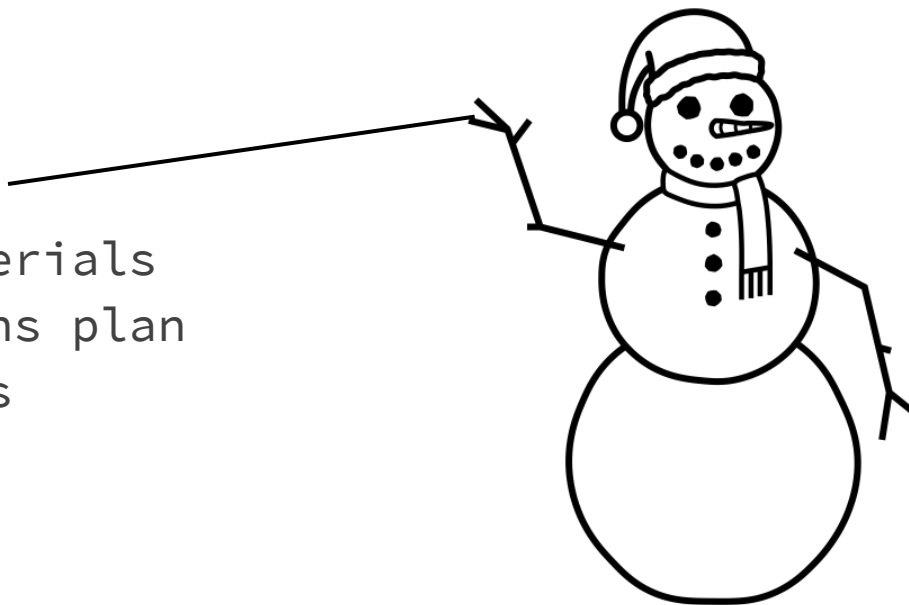
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Steps to Saying Goodbye

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Map out the process & create a timeline

- When does the subscription end?
- Who will lead the process?
- What support is needed, for staff, for users?
- Will you create a “buffer” to allow for procrastinators?

Choose your end date and lay out your schedule for the process

Example

RefWorks timeline

TIMELINE

July 2016

- ✓ Develop message for staff and U community by July 14
- ✓ Notify library staff by July 18
- ✓ Identify staff to work on August bootcamp by July 13
- ✓ Create and publish [staff RefWorks transition page](#) by July 29
- ✓ Schedule additional staff training on citation managers by July 22
- ✓ Update experts page before bootcamp (Jody - done)

August 2016

- ✓ August 4th - Offer staff bootcamp
- ✓ Publish public RefWorks transition website by 8/29
 - ✓ Include transition guides and FAQs
- ✓ Offer additional citation manager training for staff who couldn't attend boot camp
- ✓ Notify liaisons about "super users" - Megan by 8/29
 - ✓ Provide liaisons with [email template](#) for contacting super users (NOTE: most liaisons opted to send notifications to their whole departments instead of individuals)
- ✓ Work with OIT to install Mendeley on public computers (Jody)
- ✓ Put a banner on the RefWorks page on main Library webpage (Jen?)
- ✓ Update citation managers on public computers (Jody)
- ✓ Update all instructional materials and websites that reference RefWorks (e.g. citation manager comparison chart, learning object)
- ✓ Scan Libraries websites for mentions of and links to RefWorks to make changes.

September 2016

- ✓ Offer hands-on workshop to help library staff moving citations from RefWorks to another citation manager

Example

BrowZine timeline

Week of 6/19

1. Remove Browzine link from Library home page
2. Remove sign up information for Browzine from Libraries home page
3. Message sent to Monday Memo
4. Ask communications office to send Browzine message to the U Brief

Week of 6/26

1. Send message to liaisons with draft message to be sent to faculty and departments. Based on recent usage, target liaisons from Biomedical ecology, Carlson, economics, education, psychology, mathematics
2. Update library Browzine page with information on alternatives to Browzine
3. Create staff Browzine web page with messaging and alternatives to Browzine

Week of 7/17

1. Send reminder to Monday Memo about Browzine cancellation

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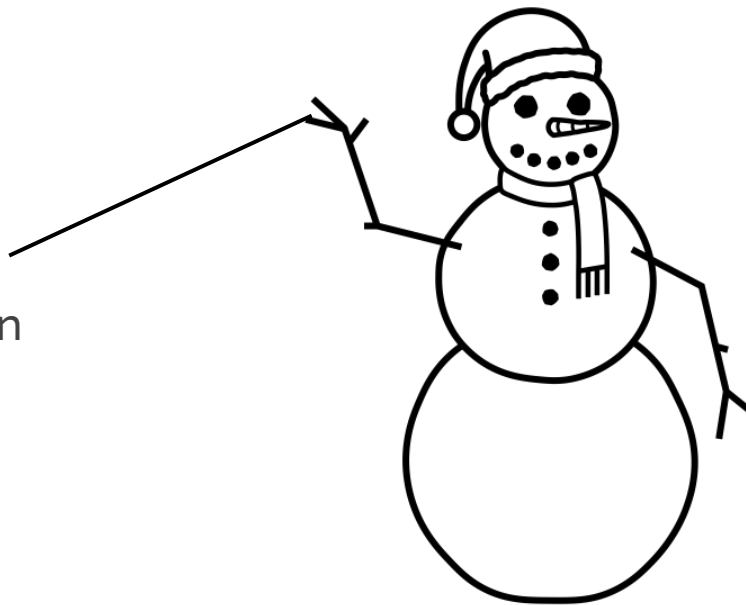
Worksheet

2. Create a timeline

- What is the subscription deadline, who will lead and support the process, do you need a buffer of time for procrastinators?
- Choose your deadline and lay out the schedule
- Assign responsibilities

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Develop support materials

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- How will you prepare staff to support the transition?
- Is training necessary for alternative tools, for staff or user community?
- What kind of web support is available, what needs to be developed?

Example

Staff support

[Committees, Councils, & Groups](#) > [Coordinating Groups](#) > [Personal Information Management Collabor](#)

RefWorks Transition

Staff information regarding the cancellation of RefWorks

Announcement

Over the past year, the PIM Citation Managers group has done a thorough examination of RefWorks in no longer the best option for our users. Since RefWorks' launch 15 years ago, other citation managers have been given this landscape along with the news that RefWorks will soon be releasing a completely redesigned Zotero, EndNote) that perform as well as or better than RefWorks. Our plan is to end our subscription

For a full picture of how this decision was made, see the [PIM 2016 RefWorks Report](#).

Talking Points

Why are we getting rid of RefWorks now?

- Over the past several years, we have seen a consistent 10% yearly drop in our number of RefWorks users.
- In the spirit of using University resources responsibly, we did not feel that we were getting additional benefits that are available to users for free.
- When the library started subscribing to RefWorks there were not many options for citation management.
- In a recent PIM survey that included 787 UMN faculty and graduate students, RefWorks was the preferred choice for Mendeley, and faculty had the highest preference for EndNote.)
- In recent years, many of our peer institutions (e.g. University of Wisconsin - Madison, Cornell University) have ended their RefWorks subscriptions for similar reasons.
- In 2016 RefWorks is launching a completely new platform, so users would be forced to learn a new interface.
- RefWorks customer service has been challenging since they were purchased by ProQuest and then moved to Mac.
- The libraries will focus on helping users find a citation manager that is appropriate for their needs.

Example

Public/user support

Research ▾

Help ▾

About ▾

REFWORKS TRANSITION

The University of Minnesota's subscription to RefWorks has expired at the end of July, 2017 and will not be renewed. This decision was made based on a steady decline in RefWorks usage paired with the availability of free or low-cost options that function as well as or better than RefWorks, and RefWorks' introduction of a new platform that would have required all of our users to migrate their accounts and learn a new interface. This page is designed to help you choose a new citation manager and to answer your questions about the transition. Please feel free to [contact us](#) if you have any questions that are not addressed here.

Choosing a new citation manager

The University Libraries support three citation managers -- EndNote, Mendeley, and Zotero. These guides showcase some of the major features and differences between the three. Schedule an appointment with your [subject librarian](#) if you want to know more.

[What is a Citation Manager?](#)

[Citation Manager Comparison Chart](#)

Migrating Your Citations to a New Citation



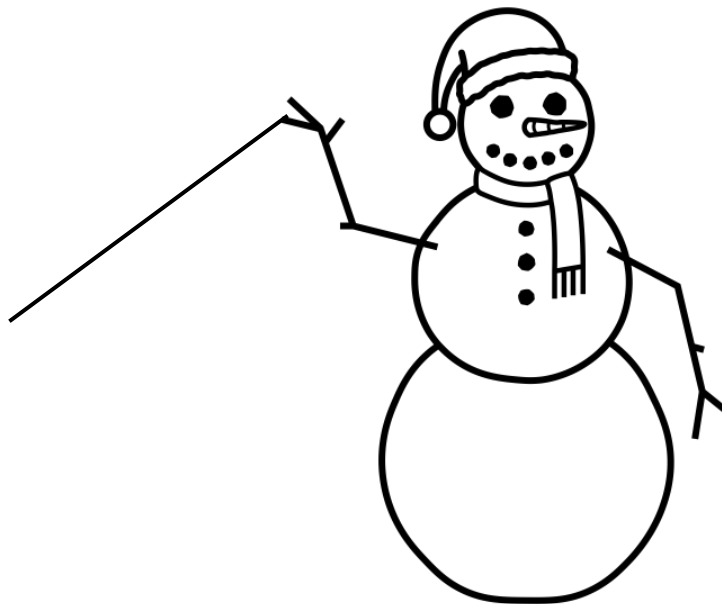
Worksheet

3. Develop support materials

- What preparation do staff need to support the transition?
- Are there alternative tools that users will need help to learn?
- Will additional web support need to be developed?

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Start With Staff

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- Who needs to know?
- How can you reach them?
- How frequently will they need updates?
- Will any of them need to be involved in communications to users (e.g. liaisons)?

What to Communicate to Staff

— — —

- Reasons for cancellation (get buy-in)
- Administrative support
- Timeline
- What support we will offer them
- Talking points to use with users

Examples

Staff Communications

[RefWorks Transition
Website for Staff](#)

[Browzine Transition
Website for Staff](#)

— — —

Examples

Staff Communications

Liaison email template:

"The University Libraries are cancelling BrowZine as of July 31, 2017.

If you have questions about the cancellation please contact Kristi Bergland or Jody Kempf.

Although there are no directly equivalent alternatives to BrowZine, I can help you find alternate ways to be notified of new journal content in your area of interest."

— — —



Worksheet

4a. Staff communications

- Who needs to know
- How can you reach them?
- How frequently will they need updates?
- Will any of them need to be involved in communications to users

Communicate to Users

- Identify all user groups that will need communications what they will need, and how to reach them.
 - What resources do you have for communication? (communications office, user email lists, campus newsletters, liaisons, etc.)
 - Some heavy users may warrant one-on-one communications
- Plan multiple messages leading up to the cancellation (set benchmarks - 6 months out, 1 month out, 1 day out)
- Is there a web presence that will need to be updated/rerouted?

What to Communicate to Users

— — —

- Reasons (not too in-depth)
- Timeline
- Alternatives
- Support/training offered

Examples

User Communications

[RefWorks Transition Guide](#)

Examples

User Communications

BrowZine Email to Campus:

The University Libraries are cancelling BrowZine as of July 31, 2017.

If you have questions about the cancellation please contact Kristi Bergland or Jody Kempf.

Although there are no directly equivalent alternatives to BrowZine, your liaison librarian can help you find alternate ways to be notified of new journal content in your area of interest.

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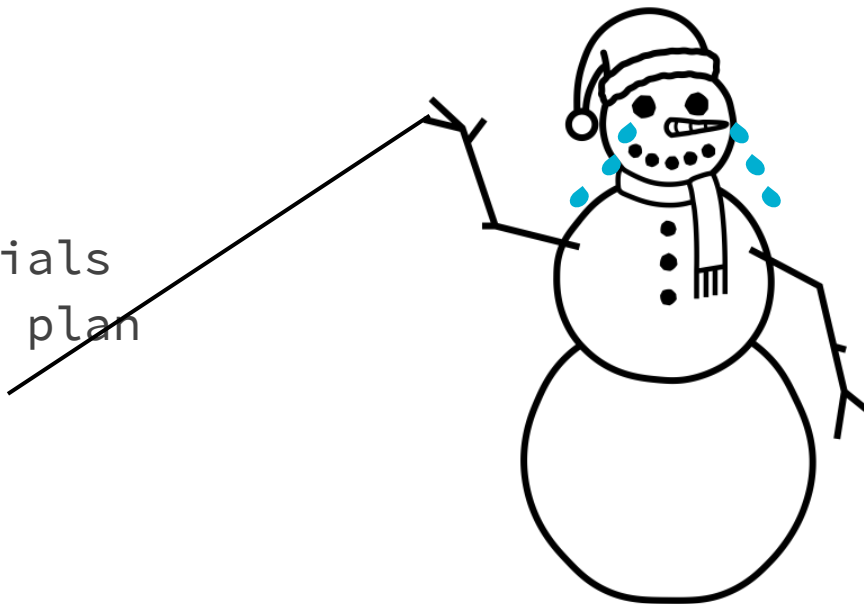
Worksheet

4b. User communications

- Who needs to know
- How can you reach them?/What resources do you have for communication?
- Will anyone need 1-on-1 support/messaging?
- How many notifications will you send?

Steps to Saying Goodbye

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It's ok if you have feelings about this. Other people might feel things too.

Be prepared for staff and users who may have strong feelings



If other people were involved, make sure to acknowledge and honor the time and work they put in.



Give it a good send-off.

Goodbye
to RefWorks!



Worksheet

5. Acknowledge emotions

- Who might have feelings about this?
- How can you address feelings?
- How can you give this tool a proper send-off?

Sharing and questions



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